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ABSTRACT

This case study of historical research on the topic of higher education focuses on the history of postsecondary distance education in an industrialized nation. The social history of the Open Learning Institute (OLI) of British Columbia is used to analyze how a new higher education institution establishes itself in its community, the consequences of choosing non-traditional methods of doing so, and the impact of external pressures and influences on such an institution. Specifically, OLI's educational and organizational policies and practices are examined as they existed and changed from 1978-1988. The questions under review are concerned with: motives, values, intentions, and visions of the people involved in OLI; their perceptions of social, political, educational, economic, and other constraints and possibilities which affected their policymaking and practice; and how and why these changed over time. In addition to information provided on the OLI, the research methodology surrounding social history is described and explained. It is noted, for example, that a hypothetico-inductive approach is useful, which places events and their interpretation in social, educational, and political contexts. It is also argued that several potentially fruitful avenues exist for the exploration of the genesis of, and changes in, an institution's policies and practices, and for the motives of the individuals and groups concerned. Research data for this study were collected from archival documents and unstructured interviews. Attention was also paid to ethical considerations in the study involving the use of politically sensitive documents, retaining the annonymity of interviewees, and ownership of materials. A 15-item annotated bibliography is attached. (60 references) (DB)

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RESEARCH IN DISTANCE EDUCATION

SOCIAL HISTORY APPROACH TO RESEARCH IN DISTANCE EDUCATION

LOUISE MORAN

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A Social History Approach to Research in Distance Education

Louise Moran

Deakin University
University of South Australia

This book forms part of IDE806 and UDE606 *Research in Distance Education*, which is a unit offered by the Institute of Distance Education, Deakin University and the University of South Australia respectively. It has been prepared for the *Research in Distance Education* team, whose members are:
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Louise Moran
Louise Moran is a doctoral student at the University of British Columbia, Canada where she is working on an historical study of the British Columbia Open Learning Agency. She is on leave from Deakin University where she was previously Director of the Educational Services Branch. Ms Moran has published on distance education, especially on aspects of inter-institutional collaboration.

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LOUISE MORAN

This is a case study of historical research on the topic of higher education, specifically the history of postsecondary distance education in an industrialised nation. The research I describe below is being undertaken towards a PhD at the University of British Columbia and is, therefore, partially shaped by institutional requirements and disciplinary expectations of a thesis. I write this Paper from within the research process, presenting formative rather than summative reflections on 'doing' history. My perceptions of the issues I deal with here have already, and will continue to change substantially as I move further through the stages of data collection and writing.

For those already familiar with the questions and methodologies of history, this Paper may exemplify one researcher's steps through some epistemological and methodological minefields of historical research. For others coming fresh to history, it may serve as an introduction to the kinds of research questions historians pose and their ways of answering them. The Paper has three parts: an outline of the study; exploration of the nature and justification of claims in social history, and their implications for this particular research; and methodological and ethical issues involved in the study.

A SOCIAL HISTORY OF THE OPEN LEARNING INSTITUTE OF BRITISH COLUMBIA 1978–1988

The post-Second World War phenomenon of mass higher education in industrialised nations includes the creation of many new universities and colleges, huge increases in student numbers, and expansion of the range of courses, disciplines and levels of teaching programs. In Canada, as elsewhere, this growth slowed in the 1970s but by no means halted. A prominent, early task for each new university or college is the establishment of its individuality, equality with its peers, and popularity in the market place—in short, a legitimacy and status beyond mere survival and beyond the legal protection of a formal mandate.

Founders have had to consider what kind of institution they were creating and why, and to implement their visions within the constraints of prevailing political, educational and social contexts. Some have used the traditional forms and structures of universities to help build their

institution's credibility. Others have eschewed convention, seeking uniqueness through innovations in pedagogy, organisational structure, resource use, and admissions requirements. Both routes are problematic, and rarely mutually exclusive.

One innovation in Canada since the early 1970s has been the metamorphosis of correspondence study from small, insignificant programs in extension departments, to substantial, often autonomous, distance education programs; and creation of three new institutions especially to offer award and non-credit studies at a distance. (Athabasca University (1970), Tele-Université de Quebec (1972), and the Open Learning Institute of BC (1978), see Mugridge & Kaufman (1986).) As new, and unusual institutions, their struggle for credibility and status was probably especially difficult. Their unconventional pedagogies, open admissions policies, pioneering use of telecommunications and other technologies, and modification of traditional organisational and financial structures and systems affected the nature, speed and degree of legitimacy accorded them, and their place in the local higher education hierarchy.

I am using a social history of one young institution—the Open Learning Institute of British Columbia (OLI)—to analyse how a new higher education institution of the late 20th century establishes itself in its community, the consequences of choosing non-traditional methods of doing so, and the impact on it of external pressures and influences. Specifically, I am examining how and why the OLI's educational and organisational policies and practices changed as they did from 1978–1988.

By 'educational policy' I mean the development of understanding about the nature and practice of distance education and open learning; courses and priorities in the OLI's four program areas; course development and production; teaching strategies and student support services; and institutional research and evaluation. By 'organisational policy' I mean the structures, systems, technologies and decision-making processes supporting creation and implementation of educational policy; and financial and personnel management.

The Open Learning Institute

The Open Learning Institute was established in June 1978, to open access to education to people hitherto inhibited from study by geographic, social or economic isolation, or by traditional admission requirements. Its

mandate was to provide programs leading to a first degree in arts and science, programs in career, technical and vocational areas, and adult basic education. To this end it was to 'manage needed support services; develop and acquire courses, programmes of study and learning material and distribute them by distance education methods', and was to enter into relationships with other organisations in British Columbia (BC) and elsewhere to do so (*OLI Board Papers*, Meeting 6, 12 Jan. 1979). By 1988, annual course registrations were over 20,000, in degree, diploma, certificate and other programs, employing a mixture of media and teaching strategies. In April 1988, the OLI amalgamated with the Knowledge Network to become the Open Learning Agency (OLA). My study ends at that point.

The OLI was a hybrid from the outset. It awarded its own degrees, like a university, but its enabling Act, mandate, and most of its reporting relationships gave it more the appearance of a community college (which could not grant degrees). Opinions differed inside and outside the OLI over whether its primary role was that of a provincial education broker for the province, producing distance education materials and coordinating distance education activities of the colleges and universities; or whether it was one among many distance education providers (albeit the largest).

This ambiguity, coupled with thinly-veiled suspicions and antagonism from other universities and colleges, may have influenced the OLI Board's early decision that its programs should harmonise with those already in existence, but still be distinctive and meet clearly identified needs (*OLI Board Papers*, Sept. 1978).

Credit transfer assumed importance in educational policymaking from the beginning, and collaborative course development and/or delivery became a norm in all the OLI's programs. The OLI's relationships with all the other higher education institutions in BC, with various professional associations, government bodies and education authorities, and with individual faculty, educators, politicians, public servants, and prominent industry and public figures, were complex and extensive.

If the OLI's role was a hybrid one, its structure resembled no other higher education institution in BC, or indeed in Canada (though it bears similarities to the National Extension College—the UK). It employed no fulltime academic staff—a matter of puzzlement and suspicion to many in the more traditionally organised universities and colleges. Courses were

prepared on contract by academics and other professionals from other institutions in BC, or were purchased and adapted as necessary. Part-time tutors (mainly academics from BC universities and colleges) were contracted to teach courses as numbers and location demanded. The Institute's fulltime staff were professional educators, administrators, technical specialists and support staff. To them fell roles played more often by academics in traditional educational settings—such as student advising and support of various kinds, creating and implementing academic policy, managing the evaluation of course materials and teaching (for details, see Mugridge 1981; Ellis & Mugridge 1983; and Mugridge 1986).

In other respects, too, the OLI's policies, structure and operations were unusual and innovative—though familiar enough to distance educators elsewhere. Complex and sophisticated sub-systems were developed for course development and production, teaching and support to students, and system management. Bi-monthly course registrations influenced the pacing of teaching and assessment. Initially, the Institute eschewed a primary emphasis on educational broadcasting (despite government pressure), but experimented with the use of television, as well as other technologies and teaching media such as telephone, audio, satellite communications, computer-assisted instruction, and electronic publishing (see, for example, Kaufman 1984, 1986; Bottomley 1986; and Mugridge 1986).

My research so far suggests the OLI's credibility remained problematic in BC throughout the decade, but the nature and strength of the problem changed as the Institute established its presence and identity, produced results, changed attitudes, and acquired legitimacy in the educational community. But I move ahead of myself.

Research questions

As a history, my research questions are concerned with motives, values, intentions and visions of the players; with their perceptions of social, political, educational, economic and other constraints and possibilities which affected their policymaking and practice; and with how and why these changed over time. For example:

- How and why was the OLI created? By whom?

- What were its leaders' motives, values and perceptions in pursuing institutional survival, legitimacy and prosperity? How did they change over time, and why?
- What internal and external factors and pressures weighed on the OLI's policies and practices during the period, and why?
- How did the OLI articulate and promulgate its institutional identity and individuality? To what purpose and effect? How and why did this sense of identity change over time for those in the organisation?
- What were the educational and organisational consequences of the OLI's mandate to teach at a distance? Why? How did they change over time?

I believe the OLI is best understood as an organisation within complicated contexts. There are the social contexts of the players in the OLI drama—their backgrounds and formative experiences, aspirations and motives, and so on, as well as the context of the world outside the OLI, including the influence of sources of power on the Institute; changes in higher education policy in BC (and, more generally, in Canada); changes in distance education in industrialised nations over the last twenty years, and the rise of information technologies and their implication for knowledge production and distribution. These areas form the backdrop to the OLI's history.

One aspect of interest is the creation and nurture of, and changes in, the OLI's institutional identity and ethos. Corporate individuality and organisational community are difficult to articulate, but may provide valuable insights into both 'in-house' understanding of organisational purpose and effectiveness, and external perceptions of the worth of the Institute. A unique corporate identity also seems to play a role in the forging of educational territory and a loyal clientele, especially in a competitive higher education environment.

The OLI's history may also be understood through the relationships of its policymakers with external authorities and individuals, such as politicians and ministry officials, executives and academics of other universities and colleges, and industry and professional organisations in BC, and other distance education institutions in Canada and internationally. I anticipate analysis of these external relationships will be especially important to understanding the acquisition of territory,

credibility, status, and respect (or their obverse). The OLI's pursuit of collaboration with many other educational organisations was probably a crucial strategy in its struggle for acceptance by all its constituencies and communities.

Making claims in social history

'History is the recording and analysis of change—when, how and why it took place, or didn't' (Silver 1990, p.1). Hobsbawm (1972) defines social history as the history of societies, that is, of the people of a society, their ideologies, and the structures within which they live. Gagan and Turner (1987) identify three fundamental and related issues in social history: the sources, timing and consequences of social discontinuity. Social history requires contextual analysis and interpretation rather than mere description or narrative. Silver argues that relating history to 'the growth of institutions or sectors is to search for understandings of experience in dialogue with understandings of social processes.' (Silver 1990, p.4).

My research adopts the canons of social history, that is, I am taking an hypothetico–inductive approach, placing events and their interpretation in social, educational and political contexts. I examine the documentary and oral evidence in the light of possible explanations and concepts, in a progressive linking of fact and interpretation, in the belief that writing history is a series of interactions between provisional selection of facts and their provisional interpretation (see Carr 1962).

The evidence must be reliable and authentic (Hoffman 1984). However, as Silver points out, '(v)erification is concerned not just with evidence, but with the acceptability and legitimacy of evidence' (Silver 1983, p.297). Since the experience cannot be re-lived, and the historian has rarely shared the experience, absolute truth is impossible. An advantage in contemporary history, however, is being able to reduce the problem of *presentism* (i.e. applying to the historical period/event the values, knowledge and mores of the historian's own time and culture). Another advantage is the possibility of using interviews with key players as well as documentary evidence. Some proofs are more plausible than others because of the quality, range and depth of evidence produced, but they will continue to be open to new interpretation based on new evidence. Both evidence and inference are therefore problematic, and require

constant reassessment throughout both data collection and writing up stages.

It is impossible to dissociate fact from interpretation (Carr 1962; Silver 1983, 1990). The facts of history are never pure, but are refracted through the mind of the document's recorder, or of the informant. Moreover, the choice of one fact as significant and rejection of another as irrelevant is, in itself, an interpretation by the researcher. Writing history is a series of stages of interaction between provisional selection of facts and their provisional interpretation, to increasingly firm conclusions as the picture and its meanings become clearer. There is a fine line between looking for evidence to support a presupposition, and concluding that the evidence bears out an emerging hypothesis. The former leads too easily to ignoring either what the evidence says, or alternative explanations.

As I write this Paper in the middle of the data collection, I believe there are several potentially fruitful avenues to explore for convincing explanations of the genesis of, and changes in, OLI's policies and practices, and for the motives of the individuals and groups concerned.

One is the desire of OLI policymakers to legitimate the organisation in the eyes of the State of British Columbia, other universities and colleges, other funding agencies, and other distance education organisations elsewhere in Canada and overseas. The driving force for OLI policymakers is likely to be the desire for organisational and professional survival and prosperity. The legitimation process may also be linked, less visibly, to a perception (within the state and parts of the education system) that distance education is a valuable means whereby the state serves the functions of capital accumulation as well as its own legitimation in a democratic society (Panitch 1980; Carnoy 1984). Such a perception appears to conflict with often expressed views that distance education is a 'second-rate alternative' to 'real' education, that is, face-to-face education. And this conflict raises further questions about the maintenance of ideological hegemony by social and economic elites through the education system (see, for example, Gramsci 1971; Young 1971; Simon 1982), and about the exercise of power by groups and individuals (see, for example, Weber 1947; Connell 1977; Giddens 1979; Apple 1982; Carnoy & Levin 1985).

If distance education remains a 'second rate alternative' in the eyes of bureaucrats and other higher educators, its legitimacy is likely to be constrained by its place in the higher education hierarchy (Clark 1978). Yet

this place is by no means clear, since distance education techniques are used at all levels from adult basic education to postgraduate study, in a variety of institutional types, ages and reputations, and they provide for a wide spectrum of student backgrounds. Distance education may prove to be a hybrid form of the social stratification of higher education (Clark 1978; Tapper & Salter 1978; Silver 1990).

A second avenue to explore is the values held by OLI policymakers about certain educational theories and pedagogical practices. For the most part, OLI staff came from conventional educational backgrounds, yet they appear to have quickly espoused contemporary views prevailing in the international distance education field about the nature of teaching and learning at a distance, for example, emphases on learner independence and autonomy, the importance of interaction and communication between teacher and learner, and the desirability of multi-media teaching strategies (see Keegan 1980, 1983; Kaye & Rumble 1981; Rumble & Harry 1982; Sewart *et al.* 1984). Sources of influence on particular OLI individuals are not yet clear, though relationships were established early on with the UK Open University and Athabasca University, and subscriptions were taken to journals such as *Teaching at a Distance*, *Epistolodidaktika*, and *Distance Education*.

Scrutiny of early OLI documents suggests OLI's policymakers may have initially adopted these values with little dispute, and proselytised them outside the Institute. However, I anticipate finding internal dispute over time about these values and theories though they may not be fully or overtly articulated in relation to actual practice within the OLI. One example is a longrunning dispute between the OLI and the BC Government over the extent to which the OLI should, could or would use television as a teaching medium. There is some suggestion that the Knowledge Network was created (in 1980) because the OLI refused to give pre-eminence to educational television as desired by the Minister and his Deputy.

A third set of possible explanations for policy decisions and motives of policymakers in the OLI concerns efforts to reduce social inequity through improving educational access. The term 'educational access' is problematic. It may refer to opportunity or to outcome (Silver 1973, 1980). Reasons for espousing improvements in access are also problematic, and linked to class, gender and race conflicts over social justice (Carnoy &

Levin 1985; Curtis 1988; Grabb 1989). Distance education's potential to overcome barriers to educational participation has been a recurring theme in the distance education literature. Most of that literature seems to value access as a 'good' without defining it or without examining closely distance education's social and political role in ameliorating or reinforcing social inequity. One exception here is a debate about the UK Open University's role in redressing social injustice (see Burgess 1972; Woolfe 1974; Scupham 1975; Tapper & Salter 1978; Harris 1987).

Preliminary research suggests that, although 'access' was probably interpreted differently by interest groups and individuals inside and outside the OLI, improvement in educational access was a motivating factor in the Institute's creation and subsequent policy formulations. BC reports prior to the OLI saw distance education as a solution to problems of educational access for scattered, isolated communities outside the metropolitan Lower Mainland. A commitment to equality of educational opportunity was built into the OLI mandate. Its effect on educational and organisational policies and practices over the ensuing decade may prove to be subtle and inferential. Interesting questions here include the nature and unanimity of commitment of OLI policymakers to social equity; the coincidence (or otherwise) of their views with those of Ministers and bureaucracy; and the consequences for the OLI's program priorities and teaching practices.

At this early stage, I speculate that a liberal democratic vision of society permeated most OLI policymakers' assumptions about the Institute's role and its relationships with external bodies, especially in relation to educational access and the social and economic needs of the state. In certain respects, the OLI may be regarded as a radical innovation with the allure of democratic provision of educational opportunity. The radical nature of its pedagogical strategies, organisational and governance structures, and unusual mandate may obscure attempts to conform broadly with BC educational norms, rather than seek more fundamental social change.

Despite the way I have framed these hypotheses, I am wary of drawing in particular social theories too firmly from the outset, lest they dominate the data collection at the expense of alternative, more powerful interpretations. Burke sees social history as 'concerned both with understanding from within and explaining from without ... and which ...

combine[s] the sociologist's acute sense of structure with the historian's equally sharp sense of change' (Burke 1980, p.30). I do not seek to prove or disprove grand social theories, such as those of Weber and Marx and their modern exponents. Rather, they suggest ways of understanding underlying social structures and forces which may illuminate some reasons for action in the OLI story, and provide ways of generalising out of the OLI experience. My final choice of theoretical frameworks will depend on the evidence, and must wait until I write up the study.

Methodological issues in the OLI study

This section is not a potted introduction to the methodology of history, about which there are numerous good texts (see, for example, my annotated bibliography). Rather, I wish to describe here the methodology of this study, and to outline some validation and ethical issues involved.

Documents and interviews

My research combines traditional literary historical techniques with interviews with key figures in the OLI's history. The major archival source is the OLI's own records. These include agenda papers and minutes of the OLI governing body and its various standing committees; annual reports; less formal papers from working parties and management committees; policy documents; memoranda and correspondence; budget and other financial material; student statistics; and institutional evaluations.

None of this material has been professionally archived or formally recorded as to item, source or period; plans for this are still embryonic. This poses problems in citation since, not only are there no guidelines, but future forms of citation may differ from those I have chosen. It is essential in any historical study that a future researcher be able to find the material cited. At the time of writing, I am seeking advice from archivists at the University of British Columbia, and erring, meanwhile, on the side of copious references in my notes.

Other primary sources include committee papers, policy documents, correspondence and memoranda from the three BC universities and some colleges; newspaper reports; Hansard and other government papers; and some material from institutions outside BC. The OLI archives reveal something of attitudes towards the Institute and its policies and activities on the part of groups and individuals in government and bureaucracy,

other colleges and universities, and professional and industry associations. They do not readily reveal private views of the OLI. Access to private working papers of, for example, Ministry officials and higher education personnel, is likely to be serendipitous. This is one reason for using interviews with key figures outside the OLI.

Once most, or all of the documentary data has been collected and sifted, about twenty open-ended, relatively unstructured interviews will be held with key figures from the government and educational bureaucracy, the OLI Board and staff, and other universities and colleges. Informants will be given an outline in advance of the issues to be covered. Each interview will be taped and transcribed; a copy will be sent to the informant for confirmation/amendment. Informants will be asked to permit my use of the interview material in the thesis and any subsequent publications arising therefrom. Tapes and transcripts will be deposited in the Open Learning Agency library and each informant will decide on conditions of future access by other researchers.

The interviews will serve two main purposes. Firstly, the information obtained will become another source of data, to be triangulated with documentary evidence. Secondly, they are a means to elicit opinion and feelings (about policies, practices, intentions and outcomes) which may not appear in the formal record. They are likely to provide valuable evidence of the affective and cognitive significance of situations to their participants and observers. Few questions will be standardised, partly because the content of each interview will differ, and partly because standardisation can lead to disregard of the social and personal contexts of meaning in the interview itself, and in subsequent interpretation (Mishler 1986).

Oral testimony, like written documents, presents problems of reliability and validity (Hoffman 1984). Oral historians and ethnographers have long recognised problems of oral testimony such as faulty memory, personal bias and ego, and the intrusion of motives and agendas outside the brief of the interview (Dunaway & Baum 1984; Hay 1986; Thompson 1988). In this instance, problems of contamination of evidence through rationalisation or modification of responses by the informant are more likely than problems of memory loss. This may be partially offset by checking each informant's testimony against other oral and documentary evidence, but it cannot be wholly eradicated.

Interview data thus require careful evaluation and cautious interpretation. They are, nevertheless, a valuable addition to documentary evidence which, itself, has potential flaws of inaccuracy, bias, hidden agendas in its construction, and incompleteness. I believe combination of the two techniques will help compensate for flaws in each, strengthening accuracy and validity of the data, contextual understandings, and interpretation of the evidence.

Ethical issues in the study

Conducting research on living people is subject to all kinds of ethical dilemmas—some resolvable, others destined to remain fuzzy, but potentially difficult.

One common problem concerns conditions for the use of material owned by someone else. I formally sought, and obtained in writing, permission from the President of the Open Learning Agency (OLA) for access to OLI's archives, explaining my research proposal in as much detail as possible. We have agreed that, should I choose to use any material which might have a current political sensitivity for the OLA, I will first discuss with him my reasons for its use. There is a fine line here between a professional relationship based on trust, and censorship by the owner of the material. If the researcher is not already well known to the material's owner, their *bona fides* must be established from the outset. It is essential to negotiate all the terms before beginning the study; later prohibitions on publication could prove frustrating and destructive (see Punch 1986).

A second issue concerns ethical and moral responsibilities of interviewers towards their informants. The interview procedure outlined above follows well-established guidelines (Dunaway & Baum 1984; Thompson 1988) with regard to interviewing techniques, release forms, and ownership of material. Obtaining informed consent and maintaining the informant's right to own the material or to withdraw at any time without prejudice are essential steps to help resolve moral dilemmas about invasion of privacy or potential harm to the social or psychological status of the individual in the community (Stone 1976; Hammersley & Atkinson 1983; Reece & Siegal 1986).

Negotiation of the boundaries of personal disclosure is particularly important in the OLI study because of the impossibility (and

undesirability) of maintaining informants' anonymity. The OLI was a small organisation, with specialised division of labour and a small hierarchy; the BC higher education system is not large enough to hide the main players in the OLI story by using the classic ploy of changing names. Nor is it justifiable to make the organisation anthropomorphic, that is, to ascribe individuals' actions and motives to the organisation as a whole, since this would patently ignore the causal implications of personal motives, values and aspirations for policy development and practice.

Another question concerns the distance between researcher and informant(s). Like other social science researchers working with people, contemporary historians must find ways of maintaining both close relationships with, and academic detachment from their 'subjects'. My OLI informants include friends and professional colleagues with whom I would normally discuss my work. The longer I spend in the OLA building, the more curiosity there is about the study, and the more my perceptions are touched by current issues and ethos. My strategy has been to confine my discussion to questions about sources of information and matters of detail. Later, I will ask a few longtime staff of the Institute to comment on my first draft. This strategy is proving acceptable to OLA staff, and both sides are comfortable with the academic distance it provides.

Conclusions

The majority of the English-language distance education literature of the last twenty years reflects practical concerns with creating, developing and maintaining new organisations or transforming existing ones. The influence of educational psychology, adult learning and educational administration has ensured a research emphasis on teaching and learning rather than on historical, social or political issues. That my research emphases are changing is a measure of maturity (and legitimacy?). Sociological studies which are now emerging are evidence of this (for example, Meek 1983; Harris 1987; Evans & Nation 1989; Evans 1989a; 1989b; Grace 1989; Morgan 1989).

Historical and political analyses remain rare. English-language examples include two somewhat hagiographic histories of Athabasca University (Hughes 1980; Byrne 1989), some studies of the early years of the UK Open University (such as Tunstall 1974; Perry 1976; Rumble 1983),

and shorter papers on particular systems or institutions (for example, White 1982; Spronk 1987). The rarity of institutional histories is probably due to the relative youth of most distance education institutions.

A social history of the OLI is a step towards filling this gap. I share Silver's view (1990) of the future–orientation of historical scholarship, especially that concerned with policy. It is a classic argument for the study of history, that is, understanding one's future through one's past. The energy, vision, achievements and vicissitudes of life as distance educators over the last two decades are intrinsically worth recording. We can learn much from them in order to face future demands of, and changes in distance education.

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ANNOTATED BIBLIOGRAPHY

Historical method and epistemology

This is my idiosyncratic selection of useful works. There are dozens, catalogued under 'D 16' in the Library of Congress system, catering for both novice and experienced historian.

Shafer, R. J. (ed.) (1980) *A Guide to Historical Method*, 3rd edn, Dorsey Press, Homewood, Illinois.

This is one of the better modern texts and a standard in North American historical method courses. It ranges from details about bibliographic aids and how to collect and record data, to techniques for external and internal criticism of evidence (for authenticity and meaning), to analysis, synthesis and preparation of drafts, to epistemological issues of proof and plausibility, the nature of history, and of historical evidence. Unfortunately, the author does not follow his own advice about non-sexist language (see, for example, p.216).

Gottschalk, L. (1950) *Understanding History*, Alfred A. Knopf, New York.

This text is now forty years old (and very sexist in its language), although it is still one of the best books around for details of historical method. It comprises sections on historical sources; methods of seeking information; taking and arranging notes; problems of authenticity and credibility; selection, arrangement and writing; and cause and inference.

Silver, H. (1983) *Education as History*, Methuen, London.

One of the best of the English educational historians, Silver shows how to combine social history with the impact of ideas, how to phrase questions about policy and underlying power structures, and how to draw out social explanations from dense and complicated issues. He includes examples of liberal and vocational education, higher education, and social inequality, and considers policy as history and as theory, and historical research as case study.

Silver, H. (1990) *Education, Change and the Policy Process*, Falmer Press, Lewes, UK.

Silver's most recent book focuses on historical policy studies, combining his interests in accountability of higher education, vocationalism in further education, and social disadvantage and schooling with an argument for the value of historical scholarship to understanding and to making of policy.

Carr, E.H. (1962) *What Is History?*, Macmillan, London.

Another classic text, and easy reading, Carr's work is especially valuable for its chapters on the relationship between facts and the historian, and causation in history. Carr sees history as a continuous dialogue between past and present.

Hexter, I. H. (1971) *The History Primer*, Basic Books, New York.

Somewhat discursive, this text contains vivid illustrations of methods for dealing with problems of causal and other explanation; prediction; deficiencies in records; reliability and validity; and details of language, syntax and style in writing up.

Social history

Burke, P. (1980) *Sociology and History*, George Allen & Unwin, London.

Burke's text is a short, eminently readable book, mercifully free of jargon and full of clear definitions. He explains how sociology and history can each be used to enhance the other, and surveys sociological methods (for example, comparison, and survey analysis), and concepts (such as function and structure, social role, socialisation, social control, social class and stratification, bureaucracy, ideology), and applies them to historical analysis. Burke also shows how various models of social change, especially conflict and modernisation models, can be used by sociologists.

Gilbert, F. & Grabaud, S.R. (eds) (1972) *Historical Studies Today*, W.W. Norton, New York.

Published at a turning point when traditional historical questions and methodology were moving towards studies of society incorporating quantitative and qualitative methodologies from the social sciences, this text includes important papers on the nature of social history (Hobsbawm), prosopography (Stone), and intellectual history (Gilbert; Kuhn; Talbott).

Oral history

This genre has grown rapidly in recent years. The following examples all include further references. See also *Oral History*, the journal of the British Oral History Association.

Thompson, P. (1988) *Voices of the Past*, 2nd edn, Oxford University Press, Oxford.

Perhaps the best book on the nature, ethics and methodology of oral history, Thompson looks at the legitimacy of oral history; evidence; memory; interviewing techniques; equipment, storing and sifting of information; and interpretation. It is essential reading for anyone using oral history, and either edition will do.

Oral History Association of Australia (1986) *Oral History Handbook*, 2nd edn, South Australian Branch, OHAA, Adelaide, SA.
This is an excellent, short publication covering the practicalities of doing oral history.

Hay, R. (1986) *The Use and Abuse of Oral Evidence*, Deakin University Press, Geelong, Vic.
This is a compact, helpful essay on the advantages of oral history over written evidence; the uses of oral history; 'contamination' of evidence; and techniques of collecting and presenting oral evidence.

Beer, D.R. (1989) `Oral history and the history of universities: The case of New England', *History of Education Review*, vol.18, no.1, pp.60–73.
This is an account of UNE's oral history project aimed at obtaining oral evidence on areas of the University's history not covered by written records. Beer deals with the choice of informants; the nature of interviews; the selection of an interviewer; and the assessment of reliability and validity of data gathered. Beer also offers to provide readers with copies of materials developed for the project.

History of distance education

The following texts are some of the very few English-language examples; there are even fewer good models.

White, M. (1982) `Distance education in Australian higher education: A history', *Distance Education*, vol.3, no.2, pp.255–278.
White presents a brief overview of developments since 1911 with particular reference to the universities of Queensland and New England and an assessment of their influences on the structure and reputation of external study to this day. It is a good starting point for anyone wishing to do an historical study in Australian higher distance education.

Meek, V.L. (1983) *The Gippsland Institute: A Sociological Case Study of a Regional College of Advanced Education*, Centre for the Study of Higher Education, University of Melbourne.
This is an ethnographic case study which is predominantly sociological in approach, but Meek devotes a significant part of the study to the history of Gippsland Institute of Advanced Education (GIAE—now Monash University College Gippsland) and its location in the broader history and structure of Australian higher education. It is an impressive piece of evaluation and a good example of the insights history can offer to other qualitative social sciences.

Rumble, G. (1982) *The Open University of the United Kingdom*, Distance Education Research Group Paper No.6, Open University, Milton Keynes, UK.

Rumble presents a case-study approach to the Open University's history as an example of innovation, covering its origins; mission; academic program; teaching strategies; student support; and organisational and financial issues. It is a well-researched paper providing a wealth of information and critical comment, but limited contextual analysis.

MASTER OF DISTANCE EDUCATION

RESEARCH IN DISTANCE EDUCATION

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